

Broadcasting Jan 7

Vol. 108 No. 1

TOP OF THE WEEK

CBS wins; NBC posts big gain in Nov. sweeps

While CBS comes in first, NBC is only one of three to show audience gains over the year before

Network analysis of Arbitron diary data from the November sweeps confirms what the overnight information had long been suggesting: NBC has increased its household delivery, while both CBS and ABC have declined. The numbers also show that NBC affiliates have increased their competitive position at the expense of, first, ABC, then, CBS. All three networks agree that their combined household delivery declined by about 5%, which, taking into account the 1.3% increase in TV households, represents an actual decrease of 6%-7% in potential homes delivered.

The CBS analysis of the Arbitron data indicates that it delivered the most households during prime time, with a 4.9% lead over second-place NBC and an 8.4% lead over ABC. Compared to November of 1983, CBS said, its prime time audience declined 6.9%; ABC's audience dropped 15.3%, while NBC was able to increase its prime time audience by 9.1%. NBC's version gives both similar changes and the same order of ranking, whereas ABC's compilation shows NBC first in total households delivered, ahead of CBS. The ABC version had NBC increasing its households delivered by 10%, while CBS declined 9.3% and ABC lost 12.5%.

Ninety percent of the NBC affiliates increased the number of prime time house-

holds they delivered, compared to November 1983, while for the other two networks roughly the reverse was true. According to CBS, 148 NBC affiliates showed a gain in households delivered during prime time, compared to 16 declining and 11 showing no change. Conversely, ABC had 13 gaining, 157 falling and seven remaining even, while CBS had 23 improving their performance, 140 delivering fewer homes and 16 remaining even. The same story was provided by ABC's interpretation of the Arbitron numbers. It had NBC increasing household delivery in 152 markets, declining in 15 and staying even in seven; CBS increasing in 21, declining in 151 and staying the same in five. ABC showed itself gaining in 19 markets, losing audience in 148 markets and remaining the same in nine.

Illustrative of the improved prime time performance of NBC is its relative standing in the top 10 markets. NBC affiliated stations increased prime time household delivery in each of those markets, except New York, which was the only one of the top 50 markets in which all three network outlets delivered fewer households. Whereas a year ago there were no NBC affiliates leading in prime time household deliveries, this time there were five NBC-led markets, including New York, Los Angeles and Chicago.

The gain NBC registered in total households was exceeded by the gain it showed in the demographic categories of women, 18-49, and men, 18-49, where, according to

information it supplied, it ranked first in both categories. NBC's interpretation of the Arbitron figures showed it gaining 16% in the women, 18-49 demographic, compared to an 11% decline at CBS and a 20% drop at ABC. Similarly it gave itself a 17% jump among men, 18-49, compared to declines of 12% at CBS and 20% at ABC. ABC's compilation for adults, 18-49, gave NBC a 17.1% gain, while CBS declined 14% and ABC declined 17.6%.

Although starting with the same data, the networks present different numbers, usually only slightly at variance. Questions such as whether or not to measure prime time programming run outside of that daypart (such as overruns) and how to measure stations with multiple affiliations are responsible for the differences.

The following chart was developed by BROADCASTING from compilations of Arbitron market-by-market reports supplied by NBC. Household numbers are in thousands (000) per average quarter hour (8-11 p.m., Monday-Saturday; 7-11 p.m., Sunday). Boldface numbers indicate the market winner. A dash (—) indicates no primary affiliate in the market. An asterisk shows a new station in the market or an affiliation change between November 1983 and November 1984. A dagger (†) indicates a city included by Arbitron in another ADI. Not included are markets that Arbitron does not measure, including those in Hawaii, Alaska and St. Thomas, Virgin Islands.

ADI (rank)	1984 households (000)			ADI (rank)	1984 households (000)		
	ABC	CBS	NBC		ABC	CBS	NBC
Abilene-Sweetwater, Tex. (156)	17	20	27	Beaumont-Port Arthur, Tex. (121)	36	47	37
Akron, Ohio† (Cleveland)	11	—	—	Bellingham, Wash.† (Seattle)	—	11	—
Albany, Ga. (152)	—	—	57	Bend, Ore. (206)	—	—	4
Albany-Schenectady-Troy, N.Y. (52)	71	89	77	Billings-Hardin, Mont. (164)	17	18	8
Albuquerque, N.M. (64)	74	47	66	Biloxi-Gulfport-Pascagoula, Miss. (178)	40	—	—
Alexandria, La. (163)	—	—	41	Binghamton, N.Y. (133)	11	46	19
Alexandria, Minn. (180)	—	36	—	Birmingham, Ala. (47)	118	49	116
Alpena, Mich. (210)	—	5	—	Bluefield-Beckley-Oak Hill, W.Va. (143)	31	—	28
Amarillo, Tex. (116)	39	27	30	Boise, Idaho (134)	24	21	28
Anniston, Ala. (194)	—	13	—	Boston (6)	278	302	303
Ardmore-Ada, Okla. (173)	13	20	—	Bowling Green, Ky. (192)	22	—	—
Atlanta (15)	180	208	181	Bristol, Va.-Kingsport, Johnson City, Tenn. (86)	25	55	78
Augusta, Ga. (104)	44	42	30	Buffalo, N.Y. (35)	101	104	100
Austin, Tex. (81)	40	58	49	Burlington, Vt.-Plattsburgh, N.Y. (101)	13	54	32
Bakersfield, Calif. (150) *	23	21	20	Casper-Riverton, Wyo. (180)	16	7	1
Baltimore (21)	156	162	153	Cedar Rapids-Waterloo, Iowa (77)	48	49	52
Bangor, Me. (154)	16	29	23	Charleston, S.C. (106)	33	50	41
Baton Rouge (89)	68	61	39	Charleston-Huntington, W.Va. (43)	70	84	124
Battle Creek, Mich.† (Grand Rapids, Mich.)	29	—	—	Charlotte, N.C. (32)	106	142	52